

Bring More Value to Your Department Meeting

Free financial education presentations
for your faculty and staff

UC's financial education classes help you and your staff get the most from the UC Retirement Savings Program—the 403(b), 457(b), and DC Plans. Now, I can tailor a presentation to fit your department meeting.



Fits Your Budget

- Classes are free
- Presented by retirement consultants dedicated to UC and permanently located in your area

“An exemplary and convenient workshop—no small feat given our varying schedules and levels of knowledge. Many employees spread the word to others on staff and continued on to make a financial plan.”

– UC San Francisco



Fits Your Schedule

- If you have 30 minutes or 3 hours, we can tailor a presentation to fit the time available
- Scheduling is easy—just contact me and book a room



Fits Your Agenda

- Classes can help you meet your training and development goals
- I'll present the topics that best suit your faculty and staff

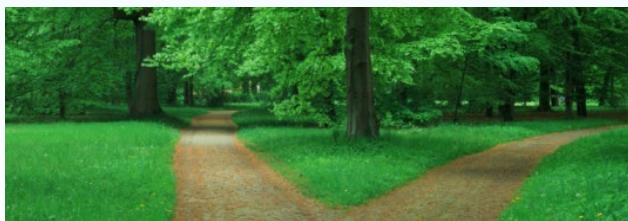
Let's Work Together!

[Learn more →](#)

For a complete catalog of available classes, visit www.ucfocusonyourfuture.com

Financial Education Presentations Tailored to Your Time and Needs. **Free.**

Plan Your UC Future CLASSES TO EXPLORE



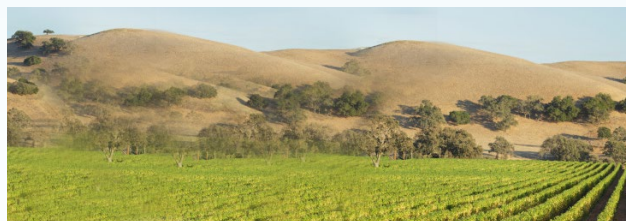
Your UC Retirement System—Introduction to UC retirement and savings benefits

Getting on the Right Path with Your UC Savings Plan—Overview of the UC Retirement Savings Program benefits, features, and investments

Creating Your Personalized Retirement Roadmap—Step-by-step guidance to using the Personalized Retirement Roadmap tool to create your action plan for retirement

Accessing Your Account Online—Online tools for managing UC Retirement Savings Program investments

Manage Your Investments CLASSES TO EXPLORE



Building A Portfolio for Any Weather—The role of asset allocation and diversification in choosing investments

Women and Investing: Build and Own Your Plan—How women approach investing

Build Your Financial Foundation CLASSES TO EXPLORE



Designing A Financial Roadmap—Introduction to planning and saving for multiple financial goals

Create a Budget, Ditch Your Debt, and Start Building for the Future—Key concepts about debt, including your credit rating and how to trim your debt

College Savings Options—Vehicles for college savings plus planning guides and available tools

Women and Investing: Get Organized—How women can build healthy financial habits

Get Ready to Retire CLASSES TO EXPLORE



Fundamentals of Retirement Income Planning—How to plan for your income and expenses in retirement

Preserving Your Savings for Future Generations—Key tools for estate planning, including strategies for gifting and insurance replacement

Women and Investing: Retirement and Income Planning for Singles—What women can do to plan for a lengthy and financially healthy retirement

Investing involves risk, including risk of loss.

Guidance provided is educational.

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